

# Investment Choice Form Transition to Retirement account & Retirement Income account



Use this form to change how your Retirement Income account is invested.

How you invest your retirement savings is an important decision. Before making a choice, please read the *Your retirement* PDS and the Target Market Determination (TMD) for the Fund's Retirement Income Product, available at [firstsuper.com.au/pds](https://firstsuper.com.au/pds), and consider obtaining financial advice. Our Advice team offers personal advice on investment choice as part of your membership fees. Call **1300 360 988** or visit [firstsuper.com.au/book](https://firstsuper.com.au/book) to make an appointment.

You can choose to switch investment options at any time, provided your account balance is at least \$1,000. Two switches each financial year are available at no additional cost. Each additional switch costs \$30.00.

Switches are processed weekly and become effective from the date on which the switch was processed. However, the Trustee reserves the right to adjust the timing of switches where it considers necessary for good management of the Fund.

**Please complete this form in BLOCK LETTERS using a blue or black pen.**

## Section 1 | Your personal details

If you have more than one First Super account, please use a separate form for each account.

Title	Member number	Account number (if known)	Date of birth (DD/MM/YYYY)
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="/"/> <input type="text" value="/"/> <input type="text" value="/"/>

Surname

Given name(s)

Residential address

Town/Suburb/City	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Postal address (if different from above)

Town/Suburb/City	State	Postcode
<input type="text"/>	<input type="text"/>	<input type="text"/>

Telephone (home)	Telephone (work)	Mobile number
<input type="text"/>	<input type="text"/>	<input type="text"/>

Email

## Section 2 | Your investment choice

You can invest in one or a combination of five investment options. Please use whole numbers and make sure your choice equals 100%. If your choice does not equal 100%, the difference may be adjusted through the Balanced option.

Investment option	Your investment choice	Example only
Shares Plus		-
Growth		10 %
Balanced (default)		40 %
Conservative Balanced		50 %
Cash		-
<b>TOTAL</b>	<b>100 %</b>	<b>100 %</b>

## Section 3 | Choose how your pension is drawn down

To tell us how you would like your income payments drawn from your account, select one option below.

If you are happy for your pension payments to be withdrawn proportionally across your investment options, go straight to section 4.

If you would like to choose your own proportion of payments to draw down from each investment option, complete column A below. Make sure the total equals 100%.

OR

If you would like to draw down your payments in a specific order, please complete column B below. In the example below, payments would be withdrawn from the Balanced option first until all funds from this investment option have been withdrawn, then from the Growth option, then from Cash.

Investment option	A. Payments will be drawn down based on the proportions you list below:	Example only	B. Payment order. Please fill in using numbers:	Example only
Shares Plus		-		-
Growth		30 %		2
Balanced (default)		40 %		1
Conservative Balanced		-		-
Cash		30 %		3
<b>TOTAL</b>	<b>100 %</b>	<b>100 %</b>		

## Section 4 | Declaration

By signing this form, I request that First Super changes my investment choice and how my pension payments are withdrawn from my account.

- > I acknowledge that I have obtained and read the information about investments in the *Your retirement* PDS and the Fund's Retirement Income Product TMD available by calling First Super on **1300 360 988** or visiting **firstsuper.com.au/pds**.
- > I understand the effect of, and any risk involved in, switching my investment option(s) and agree that First Super has no liability for my choice.
- > I understand that past performance is not a guarantee of future performance and have considered whether I need specific financial advice before making an investment decision.
- > I acknowledge that the Trustee (First Super) may maintain one or more reserves in the course of operating the Fund and that conditions including fees, switching costs and the timing of switching (including possible suspension during volatile periods) are subject to variation from time to time at First Super's discretion.

I confirm that I am authorised to provide the personal details presented in this form and I consent to my information being checked with First Super or the official record holder via third-party systems for the purpose of confirming my identity.

**Please sign here**

**Date (DD/MM/YYYY)**

**This form must be received within 30 days of the date you sign it or it will not be valid.**

### Please return this completed form by:

 First Super, PO Box 666, Carlton South, VIC 3053


 [mail@firstsuper.com.au](mailto:mail@firstsuper.com.au)

**If your form is returned to us unsigned or incomplete, your request will not be processed.**

### Want to know more? We're here to help.

 1300 360 988

 [mail@firstsuper.com.au](mailto:mail@firstsuper.com.au)

 Download the First Super app to manage your account

 [firstsuper.com.au](http://firstsuper.com.au)



The advice provided in the *Your retirement* PDS is general in nature, and you should seek advice in relation to your personal situation. The First Super Advice team can provide you with personal advice about investment choice suited to your circumstances. Call **1300 360 988** or visit **firstsuper.com.au/book** to make an appointment..

First Super Pty Ltd ABN 42 053 498 472, AFSL No. 223988. August 2024.